

Probate Status Hearing RE: Receipt of Transfer

Age:	On 7/2/15, this Court ordered proceedings transferred to the Superior Court of California, County of Santa Barbara.	NEEDS/PROBLEMS/COMMENTS: 1. Need receipt from Santa Barbara County Superior Court showing file received, case created.
DOD:		
Cont. from	Notice of Transfer of Papers and Pleadings indicates mailing on 7/23/15.	
Aff.Sub.Wit.		
Verified	<p>Certified mail return receipt filed 7/30/15 indicates receipt by Santa Barbara Superior Court on 7/27/15; however, no receipt has been received from the Probate Department indicating that the file has been received and a new case created there.</p>	
Inventory		
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Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
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Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		

2A Paul Harvey Wallace (Estate)**Case No. 08CEPR00294****Atty Donaldson, Larry A. (pro per – former Executor)****Atty Kruthers, Heather H. (for Public Administrator – successor Administrator)****Amended Trust Accounting for 2007, 2008, 2009, 2010, 2011, 2012 and Partial Accounting 2013**

DOD: 06/22/07	LARRY A. DONALDSON , friend, was appointed as Executor without bond on 05/27/08 and Letters were issued on 06/18/08.	NEEDS/PROBLEMS/COMMENTS: See Page 12 for a related matter. <u>CONTINUED FROM 07/29/15</u> 1. The accounting does not comply with the Probate Code, specifically the format for accountings outlined in Probate Code §1060. In addition the accounting appears to be for the Paul Harvey Wallace Trust. The Paul Harvey Wallace Trust is not before the court. Mr. Donaldson needs to file an accounting for the Estate of Paul Harvey Wallace.
Cont. from 040714, 050514, 070714, 090814, 102314, 012115, 032515, 062415, 072915	The Court accepted Mr. Donaldson's withdrawal as executor on 7/26/13 and appointed the Public Administrator. Letters of Administration were issued to the Public Administrator on 08/01/13.	
Aff.Sub.Wit.		
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Citation		
FTB Notice		
Reviewed by: JF		
Reviewed on: 09/02/15		
Updates:		
Recommendation:		
File 2A – Wallace		

2A

2B Paul Harvey Wallace (Estate)

Atty Donaldson, Larry A. (former Executor)

Atty Kruthers, Heather H. (for Public Administrator – Successor Administrator)

Case No. 08CEPR00294

Order to Show Cause Re: Failure to Appear; Imposition of Sanctions in the Amount of \$600.00

DOD: 06/22/07	LARRY A. DONALDSON , friend, was appointed as Executor without bond on 05/27/08 and Letters were issued on 06/18/08.	NEEDS/PROBLEMS/COMMENTS: <u>CONTINUED FROM 07/2915</u> Minute Order from 06/24/15 states: The Court imposes the previously ordered \$600.00 sanction as to Mr. Donaldson and orders that it be paid within one week. As of 09/02/15, it does not appear that the sanctions have been paid.
Cont. from 010214, 013014, 022014, 041714, 050514, 070714, 090814, 102314, 012115, 032515, 062415, 072915	On 07/26/13, LARRY DONALDSON resigned as Executor and the PUBLIC ADMINISTRATOR , was appointed as Administrator. Letters of Administration were issued to the Public Administrator on 08/01/13.	
Aff.Sub.Wit.	Minute order from 12/05/13 set this matter for an Order to Show Cause and states: The Court sets the matter for an Order to Show Cause on 01/02/14 regarding Larry Donaldson's failure to appear and imposition of sanctions in the amount of \$600.00. The Court sets a further Order to Show Cause on 01/02/14 regarding Larry Donaldson's failure to provide information to the successor administrator timely and imposition of sanctions in the amount of \$800.00. Larry Donaldson is ordered to be personally present on 01/02/14.	
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Citation		
FTB Notice		
	Reviewed by: JF	
	Reviewed on: 09/02/15	
	Updates:	
	Recommendation:	
	File 2B – Wallace	

2B

Order to Show Cause Re: Failure to Provide Information to the Successor Administrator Timely; Imposition of Sanctions in the Amount of \$800.00

DOD: 06/22/07		LARRY A. DONALDSON, friend, was appointed as Executor without bond on 05/27/08 and Letters were issued on 06/18/08.	NEEDS/PROBLEMS/COMMENTS:										
		On 07/26/13, LARRY DONALDSON resigned as Executor and the PUBLIC ADMINISTRATOR, was appointed as Administrator. Letters of Administration were issued to the Public Administrator on 08/01/13.	<u>CONTINUED FROM 07/29/15</u> Minute Order from 06/24/15 states: The Court imposes the previously ordered \$800.00 sanction as to Mr. Donaldson and orders that it be paid within one week. As of 09/02/15, it does not appear that the sanctions have been paid.										
Cont. from 010214, 013014, 022014, 050514, 070714, 090814, 102314, 012115, 032515, 062415, 072915													
Aff.Sub.Wit.		Minute order from 12/05/13 set this matter for an Order to Show Cause and states: The Court sets the matter for an Order to Show Cause on 01/02/14 regarding Larry Donaldson's failure to appear and imposition of sanctions in the amount of \$600.00. The Court sets a further Order to Show Cause on 01/02/14 regarding Larry Donaldson's failure to provide information to the successor administrator timely and imposition of sanctions in the amount of \$800.00. Larry Donaldson is ordered to be personally present on 01/02/14.	<table border="1"> <tr><td colspan="2">Reviewed by: JF</td></tr> <tr><td colspan="2">Reviewed on: 09/02/15</td></tr> <tr><td colspan="2">Updates:</td></tr> <tr><td colspan="2">Recommendation:</td></tr> <tr><td colspan="2">File 2C – Wallace</td></tr> </table>	Reviewed by: JF		Reviewed on: 09/02/15		Updates:		Recommendation:		File 2C – Wallace	
Reviewed by: JF													
Reviewed on: 09/02/15													
Updates:													
Recommendation:													
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Citation													
FTB Notice													

First and Final Account and Petition for Settlement

DOD: 06/22/07		LARRY DONALDSON , former personal representative, is Petitioner. Account period: 06/22/07/ - 07/26/13 Accounting: \$1,622,112.59 Beginning POH: \$1,619,273.76 Ending POH: \$25,286.68 Fees for former personal representative or attorney <u>NOT ADDRESSED</u> Petitioner states: Pursuant to the provisions of decedent's will, Petitioner distributed assets of the estate to himself as Trustee of the 2007 Paul Harvey Wallace Family Trust dated May 2, 2007 (the "Trust"). In his capacity as trustee, Petitioner deposited refund checks received in the name of the Estate of Paul Harvey Wallace directly into accounts for the Trust. Petitioner executed a deed and conveyed title to the decedent's residence to the Trust. Various bank accounts standing in the name of Paul Harvey Wallace were closed and the monies were transferred into accounts held in the name of the Trust. All debts of the deceased were paid by Petitioner in his capacity as trustee of the Trust. Petitioner has paid probate costs and expenses directly from the Trust, including fees for attorney services related to legal work required for this probate proceeding. Petitioner prays for an Order settling the First and Final Account.	NEEDS/PROBLEMS/COMMENTS: See page 18 for related accounting of the Paul Harvey Wallace Trust 1. Petitioner states that he paid attorney's fees for legal work required for this estate from the Paul Harvey Wallace Family Trust. Need information regarding the fees paid. Fees paid to a personal representative or his or her attorney are subject to court approval prior to payment and are set forth in Probate Code § 10800. 2. Inventory & Appraisal filed 06/24/13 indicates that it is a partial #1. No Final Inventory & Appraisal has been filed and the Petition does not discuss the Inventory & Appraisal at all. Need clarification as to whether the partial #1 filed 06/24/13 is the final Inventory. 3. The Petition does not address whether Notice to Creditor's was sent. Note: Declaration of Larry A. Donaldson in Support of Trustee's Report and Account for Petition for Settlement was filed in this estate matter on 08/31/15. However, the Declaration refers to the Trust Accounting and it appears this Declaration should have been filed in case no. 14CEPR00601 regarding the Trust.
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Reviewed by: JF
Reviewed on: 09/03/15
Updates:
Recommendation:
File 2D – Wallace

Age: 12		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p style="text-align: center;"><u>OFF CALENDAR</u></p> <p>Request for Dismissal was entered 8/24/15.</p> <p>General hearing set for 9/28/15 has also been taken off calendar.</p>	
Cont. from 081215			
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	Sp.Ntc.		
	Pers.Serv.		X
	Conf. Screen		
	Letters		X
✓	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		
		Reviewed by: skc	
		Reviewed on: 9/2/15	
		Updates:	
		Recommendation:	
		File 3 – Estrada	

4 Ariel Golden, Dallas Kerns, Dylan Kerns & Dewayne McCoy (GUARD/P)**Case No. 09CEPR00065****Guardian Crawford, Angelita C. (Pro Per – Guardian)****Petitioner English, Anita (Pro Per – Mother)****Review Re: Visitation**

Dallas age: 10	ANITA R. ENGLISH , mother, is petitioner. ANGELITA CRAWFORD , maternal grandmother, was appointed guardian of Ariel on 4/22/2009 and was appointed guardian of Dallas, Dylan and Dwayne on 1/12/13. Minute Order of 06/03/2015 set this Review regarding Visitation. Minute Order states: Anita English states that her Petition for Visitation only pertains to Dewayne; she does not want to visit with the other minors at this time. The Court orders supervised visitation for Ms. English for 2 hours per week at CYS; Ms. English is to pay 100% of the cost of said visits.	NEEDS/PROBLEMS/COMMENTS: Note: Petition is as to Dallas Kerns, Dylan Kerns, and Dewayne McCoy only.
Dylan age: 6		
Dewayne age: 3		
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Citation		
FTB Notice		
Reviewed by: LV		
Reviewed on: 09/03/2015		
Updates:		
Recommendation:		
File 4 – Golden/Kerns/McCoy		

Petition for Authority to Give Consent to Med. Treatment

			See petition for details.	NEEDS/PROBLEMS/COMMENTS:
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
	Aff.Mail			
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.	W		
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	Objections			
	Video Receipt			
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✓	Order			
	Aff. Posting			
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	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 9/2/15	
			Updates:	
			Recommendation:	
			File 5 – Poff	

Petition for Surcharge Against Former Administrator for Breach of Fiduciary Duty

DOD: 7/11/08		<p>PUBLIC ADMINISTRATOR, Successor Administrator, is Petitioner.</p> <p>Petitioner states Jo Anne Ruth Fuchs was appointed as administrator of the estate on 12/8/09 with \$30,000.00 bond, which was filed 1/8/10. Ms. Fuchs was removed as administrator per minute order 3/15/13.</p> <p>A partial I&A was filed by the former administrator consisting of vehicles and trailers, total value \$8,100. The PA filed a final I&A on 1/28/15 showing an additional value of \$15,950 consisting of vehicles and trailers. The total appraised value of the estate is \$24,050.</p> <p>Ms. Fuchs sold the following items from the 2010 I&A:</p> <ul style="list-style-type: none"> • 1955 Peterbilt Truck: \$400 • 1956 Peterbilt Truck: \$400 • 1970 Chevrolet Pickup: \$7,000 <p>Ms. Fuchs sold the following items from the 2015 I&A:</p> <ul style="list-style-type: none"> • 1979 Boat Trailer (50%): \$450 • 1979 Belmont Boat: \$5,000 • 1973 Trailer: \$150 • 1982 Chevy El Camino: \$5,000 • 1970 Chevrolet Pickup (50%): \$3,750 <p>The PA sold the following items from the 2010 I&A:</p> <ul style="list-style-type: none"> • 1970 trailer dolly: \$300 <p>The PA sold the following items from the 2015 I&A:</p> <ul style="list-style-type: none"> • Striped Motorboat: \$200 • Flatbed Utility Trailer: \$1,000 • Misc. motors and parts: \$400 <p>The PA was able to recover \$1,900 worth of assets to sell, so Ms. Fuchs misappropriated \$22,150 worth of assets. She admitted to the PA that she sold the items and kept the money. Therefore, she should be surcharged the amount of \$22,150.</p> <p>Petitioner requests an order that:</p> <ol style="list-style-type: none"> 1. The Court find that Jo Ann Ruth Fuchs breached her fiduciary duty as personal representative of the above-named estate; 2. The Court find that Ms. Fuchs' breach cost the estate the amount of \$22,150 and surcharge her that amount; 3. The Court make an order that Western Surety Company, or any successor of that company, be ordered to pay the bond of \$22,150 to the PA; and 4. The Court make any other proper orders. 	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>SEE PAGE 2</u></p>	
Cont. from 070815				
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<input checked="" type="checkbox"/>	Notice of Hrg			
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<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			

Reviewed by: skc

Reviewed on:
9/2/15

Updates:

Recommendation:

File 6 - Esparza

Page 2

NEEDS/PROBLEMS/COMMENTS:

1. Two of the items sold by Ms. Fuchs were inventoried on the 2015 I&A filed by the PA as follows:

- 50% interest in 1979 Boat Trailer \$450 (100% \$900)
- 50% interest in 1970 Chevrolet Pickup \$3,750 (100% \$7,500)

However, in the Judgment Determining Ownership filed 12/9/10, the Court found that those two items, among others, were owned by Albert Esparza as sole title holder.

Need clarification as to why the I&A lists them at 50% ownership, and why Ms. Fuchs shouldn't be surcharged for the entire value of each item.

2. Examiner notes the following additional discrepancies regarding the I&As:

- Judgment Determining Ownership filed 12/9/10 included a 1993 Chevrolet Silverado Pickup; however, this vehicle is not identified in either of the I&As filed. What happened to this vehicle?
- The Partial I&A filed 9/29/10 by Ms. Fuchs included a 1970 Chevrolet pickup valued at \$7,000. The Final I&A filed 1/28/15 includes the same 1970 Chevrolet pickup, but this time it was valued at a 50% interest of \$7,500 (not \$7,000) or \$3,750 (as noted in #1 above).
- The Judgment Determining Ownership filed 12/9/10 included Item #9: "A boat being refurbished and currently unregistered," with no other identifying characteristics. The Final I&A filed 1/28/15 includes Item #1: "Yellow, White, and Green Striped Motorboat (without motor)" valued at \$200. Is this the same boat? Need clarification.
- The Judgment Determining Ownership filed 12/9/10 included Item #10: "Various tools and equipment belonging to decedent." The Final I&A filed 1/28/15 includes Item #3: "Miscellaneous Motors and Parts" valued at \$400. Do these descriptions refer to the same items? Need clarification.

Based on the above discrepancies, it appears supplemental or corrected I&A may be appropriate.

Petitioner Candelario Ybarro, Jr. (Pro Per Petitioner)

Petition for Visitation

		CANDELARIO YBARBO, JR., father, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:	
		DEBRA MACIAS, non-relative (former girlfriend of child's father), was appointed Guardian on 8/29/2011.	1. Need <i>Notice of Hearing</i> and proof of 15 days' service prior to hearing of the <i>Notice of Hearing</i> with a copy of the <i>Petition for Visitation or Consent and Waiver of Notice</i> , for: <ul style="list-style-type: none"> • Debra Macias, Guardian. 	
Cont. from		~Please see Petition for details~	2. Petitioner previously reported that he is of Native American Ancestry – of the Apache Tribe and of another tribe in Alaska, but he could not remember the tribe name. Notice pursuant to the Indian Child Welfare Act (ICWA) was not provided at the time the instant guardianship was granted on 8/29/2011. <i>Notice of Child Custody Proceeding for Indian Child</i> (Form ICWA-030) is required for this matter to proceed, which the Court will serve on necessary agencies, including the Bureau of Indian Affairs. File contains a blank copy of this form for completion and return to the Probate Court Clerk immediately for service to required agencies.	
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	ICWA			X
	Not.Cred.			
	Notice of Hrg			X
	Aff.Mail			X
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	FTB Notice			
			Reviewed by: LEG	
			Reviewed on: 9/2/15	
			Updates:	
			Recommendation:	
			File 7 – Ybarbo	

See petition for details.			NEEDS/PROBLEMS/COMMENTS:
			<u>Minute Order 7/29/15</u> : This matter is short set for proof of termination of the VA guardianship so that this Court can make temporary orders.
			<u>Minute Order 8/5/15</u> : Petitioner reports that the paternal grandmother's name is Rosa Esqueda; proper service is to be effected. Additionally, Ms. Dominguez is to inquire as to the paternal grandfather's name and make attempts to locate him for service.
			1. Need proof of service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing per Probate Code §1511 <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence on:
			- Paternal Grandfather (not identified)
			- Paternal Grandmother Rosa Esqueda
			Reviewed by: skc
			Reviewed on: 9/2/15
			Updates:
			Recommendation:
			File 8 – Esqueda

Cont. from 062415, 072915, 080515		
	Aff.Sub.Wit.	
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	Not.Cred.	
	Notice of Hrg	X
	Aff.Mail	X
	Aff.Pub.	
	Sp.Ntc.	
	Pers.Serv.	
✓	Conf. Screen	
✓	Letters	
✓	Duties/Supp	
	Objections	
	Video Receipt	
✓	CI Report	
✓	Clearances	
✓	Order	
	Aff. Posting	
	Status Rpt	
✓	UCCJEA	
	Citation	
	FTB Notice	

Petition for Visitation

			See petition for details.	NEEDS/PROBLEMS/COMMENTS: <u>Note:</u> Shalon Moon, Mother, filed a Petition for Termination of Guardianship on 4/15/15 that was heard on 6/16/15. On 6/16/15, the Court denied the petition and ordered supervised visits for Ms. Moon. On 8/24/15, Ms. Moon filed a new Petition for Termination of Guardianship that is set for hearing on 10/26/15.
	Aff.Sub.Wit.			
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	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
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	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 9/2/15	
			Updates:	
			Recommendation:	
			File 9 – White	

Attorney: Linda K. Durost (for Petitioner/Administrator Toni Richardson)

Attorney: Gary Winter (for Objector, Bill Richardson)

**Amended First and Final Report and Account of Administrator; for Allowance of
Statutory Attorneys' Fees and Costs; Allowance of Statutory Administrator's Fees and for
Final Distribution**

DOD: 6/2/11		TONI RICHARDSON , Administrator, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Account period 2/22/12 – 2/2015	<p>Continued from 7/22/15. Minute order states the Court notes that the objection was late filed. The Court admonishes that it will not accept any more late filed documents. Regarding the issue of statutory attorney fees, Ms. Durost represents that she has never had any contact from Mr. Felger. The Court orders that if the Court does not receive a signed declaration from Mr. Felger regarding the attorney fees, the Court will proceed without further input from him. Any additional documents are to be filed no later than 9/2/15. As of 9/4/15 no additional documents have been filed.</p> <p>1. This estate was opened using a fee waiver. Filing fees are considered costs of administration. Therefore, the filing fee of \$435.00 is now due for the filing of the initial petition for probate. – Declaration of Attorney filed on 7/22/15 states she tried to pay the fee but the probate clerk would not accept it.</p>
Cont. from 072215		Accounting - \$178,548.26	
<input type="checkbox"/>	Aff.Sub.Wit.	Beginning POH - \$177,550.00	
<input checked="" type="checkbox"/>	Verified	Ending POH - \$106,186.69	
<input checked="" type="checkbox"/>	Inventory	Attorney - \$4,562.00	
<input checked="" type="checkbox"/>	PTC	Administrator - \$4,562.00	
<input checked="" type="checkbox"/>	Not.Cred.	Attorney costs (filing fee) - \$435.00	
Notice of Hrg		Reimbursement of costs to Administrator - \$20,488.00	
<input type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.	Distribution, pursuant to intestate succession, is to:	
<input type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters 2/22/12	Toni Richardson - \$36,794.14	
<input type="checkbox"/>	Duties/Supp	Bill Richardson - \$36,794.14	
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
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			Reviewed by: KT
			Reviewed on: 9/4/15
			Updates:
			Recommendation:
			File 10 - Bonham

2. Inventories and appraisals filed total \$183,050.00 and not \$177,550.00 as stated in the accounting. (Reappraisal for sale is just for the sale of the real property. The inventory and appraisal with the date of death value is the correct inventory to use for account purposes.)
3. Statutory fees are calculated incorrectly. Attorney incorrectly included the mortgage payoff as a loss on sale. The correct statutory fees should be \$6,354.79. Calculated on the fee base as follows:

I & A	-	\$183,050.00
Receipts	-	\$ 543.03
Gains on sale	-	\$ 400.00
Less loss on sale of real property-		<u>\$ 5,500.00</u>
Total fee base	-	\$178,493.03
4. Need Allowance or Rejection of Creditor's Claim for the Creditor's Claim of DMC filed on 4/27/12. California Rules of Court, Rule 7.401 states that for each creditor's claim filed the Administrator must (1) Allow or reject the claim (2) serve a copy of the claim on the creditor (3) file a copy with proof of service with the court.
5. Escrow closing statement shows that the Administrator received \$110,594.07 from the sale of the real property. The proceeds were ordered into a blocked account. Receipt for Blocked account shows a deposit of \$105,594.07. A difference of \$5,000. Petitioner states when the sale proceeds were deposited, prior to it being blocked, the bank automatically withdrew \$2,300 to pay the balance of the Decedent's credit card. Petitioner states she paid Sam LaPlaca \$1,000 for roofing work he had done on the residence and another \$1,700.00 for other repairs. Examiner note: The declaration of Petitioner for reimbursement of costs also include a \$1,000 payment to Sam LaPlaca Construction for roofing repairs. Is the \$1000 that petition is asking to be reimbursed in addition to the \$1,000 paid from the proceeds of the real property sale? Court may require receipts for the repairs done from Sam LaPlaca Construction.
6. Warren Felger was the former attorney in this case. Therefore he is entitled to a portion of the statutory attorney fees. Need agreement from the attorneys as to apportionment of the attorney fees. – Attorney Durost states that attempts to discuss the fees with Mr. Felger have gone unanswered. Mr. Felger made numerous errors and failed to communicate with petitioner and advise petitioner properly with respect to the account management. Attorney Durost requests that no part of the statutory fees be attributable to Mr. Felger. – *Declaration of Attorney filed on 7/22/15 states the only response to she received from Mr. Felger was a large hourly billing statement from him at \$340 her pour for a total of \$13,158.00 in fees and \$1,565.68 in costs.*
7. Creditor's claim of Toni Richardson includes an entry on 3/10/13 for \$500 to Warren Felger for filing fees. Petitioner states she paid Mr. Felger \$500 for filing fees that apparently he never paid.
8. Petitioner states she distributed \$5,000 and jewelry valued at \$250.00 to her brother Bill Richardson. Need receipts for preliminary distribution.

Please see additional page

Objections of Bill Richardson filed on 7/21/15 alleges the inventory and appraisal filed on 2/10/15 is incorrect in that it failed to disclose the proceeds of the trailer that was sold prior to decedent's death with the proceeds received after the decedent's death. Petitioner also alleges that the proceeds of the trailer - \$5,000 – was given directly to objector. However, Objector contends that the trail was not property of the Decedent, but actually belonged to Frances L. Foster, Decedent's long time live-in boyfriend, who died shortly before the Decedent. Therefore, since the trailer was not the Decedent's property it should not have been included in Petitioner's Second Corrected Inventory and Appraisal and therefore the total value of the Second Inventory and Appraisal (\$7,550) should be reduced by \$5,000.

Petitioner alleges to have distributed ½ of Decedent's jewelry, appraised at \$500 total, to Objector. However, Objector contends to have never received any jewelry. Therefore should not be credited with an advance distribution of Decedent's jewelry. Because Objector received no advance distribution from Decedent's estate, Objector contends that not only is Petitioner not entitled to any equalizing distribution, but that Objector should receive an equalizing advance distribution of \$2,950, in light of Petitioner's advance distributions to herself (vehicle valued at \$1,550; jewelry valued at \$500; and \$900 from the sale of Decedent's personal property).

Probate Examiner Notes dated 5/5/15 identify the fact that the Court ordered proceeds from the sale of the Decedent's home into a blocked account, that Petitioner received \$110,594.07 from the property, and deposited only \$105,594.07. In explaining the whereabouts of the missing \$5,000, Petitioner indicates in her Amended Report that (1) EECU deducted \$2,300 for payment in full on Decedent's EECU credit card balance; and (2) she paid Sam Laplaca \$1,000 out of the funds to repair the property's roof, and \$1,700 for other repairs and cleanup on the house. However, Objector contests these claims.

Objector asserts that the Decedent did not owe any balance on an EECU credit card at the time of her death. Additionally, Objector knows Sam Lapaca personally, he is Petitioner's son and Objector's nephew. Objector claims Mr. Laplaca is not a California licensed contractor, and if he performed the services Petitioner claims to have paid him for, he would be in violation of Assembly Bill 2237, which requires anyone working on a construction project worth \$500 or more to be a licensed contractor. Moreover, Petitioner is in violation of Probate Code §1064(a)(4) by not disclosing the familial relationship with Mr. Laplaca in the Amended Report.

Barring satisfactory evidence as to Petitioner's claims regarding the expenditure of the missing \$5,000, Objector requests the amount be charged against the Petitioner's compensation as Administrator, with any remaining charge credited against Petitioner's final distributive share in favor of Objector.

Petitioner seeks \$20,488 in reimbursable administrative costs. Objector specifically contests each and every expense Petitioner has submitted for reimbursement. Objector requests satisfactory evidence to support the correctness of each charge listed in the schedule (explained in greater detail in the objections).

Please see additional page

Objections of Bill Richardson filed on 7/21/15 (Cont.):

Wherefore, Objector prays for an order:

1. Petitioner/Administrator's Second Corrected Inventory and Appraisal be reduced by \$5,000 to reflect the fact that the itemized trailer was not estate property and Objector never received any sale proceeds.
2. Objector be entitled to an equalizing preliminary distribution of \$2,950 to offset the advanced distributions Petitioner/Administrator made to herself.
3. Petitioner produce satisfactory evidence to support her claims regarding the \$5,000 missing from the sale of Decedent's house within 30 days of this Order, or otherwise have that amount charged against her fiduciary compensation and final distributive share if necessary.
4. Petitioner produce satisfactory evidence to support the correctness and legitimacy of each and every charge listed for her reimbursement schedule within 60 days of this Order, or otherwise have any and all unsupported charges disallowed.
5. Costs and attorneys fees as allowable by law and according to proof.

Statement of Public Administrator's Disposition of Property; and
Request for Discharge.

DOD: 3/20/13	PUBLIC ADMINISTRATOR , Administrator, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
	Account period: 3/20/13 – 6/11/15	
Cont. from 081215	Accounting - \$112,954.82	
Aff.Sub.Wit.	Beginning POH - \$110,000.00	
✓ Verified	Ending POH - \$0	
Inventory	Administrator - \$4,046.06	
PTC	(less than statutory)	
Not.Cred.		
✓ Notice of Hrg	Attorney - \$4,046.06	
	(less than statutory)	
✓ Aff.Mail	W/ Bond fee - \$421.26	
Aff.Pub.	(o.k.)	
✓ Sp.Ntc.	W/ Petitioner states a creditor's claim was	
Pers.Serv.	filed in the sum of \$193,977.67 by the	
Conf. Screen	Department of Health Services. The	
Letters	residue of the estate was paid to the	
Duties/Supp	Department of Health Services.	
Objections	Petitioner requests that this estate be	
Video Receipt	settled and closed until such time as	
CI Report	further assets may be discovered and	
9202	return of these proceedings may be	
✓ Order	necessary. It is further requested that	
Aff. Posting	the Public Administrator be	
Status Rpt	discharged in this matter.	
UCCJEA	The Department of Health Care	
Citation	Services filed a Request for Special	
FTB Notice	Notice, which was not withdrawn, so	
	this matter was set for hearing.	
		Reviewed by: KT
		Reviewed on: 9/3/15
		Updates:
		Recommendation: SUBMITTED
		File 11 – Burton

Petitioner Milton, Shawn Lee (Pro Per Petitioner, Father)

Attorney Splivalo, Michael (for Michael W. Purkey, Jr., and Julie E. Cable Skaggs, Guardians)

Petition for Visitation

		SHAWN LEE MILTON, father, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		MICHAEL W. PURKEY, JR., and JULIE E. CABLE SKAGGS, mother's step-grandfather and the step-grandfather's fiancé, were appointed Co-Guardians on 11/21/2013.	Continued from 7/22/2015. Minute Order states examiner notes provided in open court.
Cont. from 072215			Note: Order on Ex Parte Petition for Visitation filed 7/2/2015 set this matter for hearing on 7/22/2015, and requires Petitioner to serve notice to the Guardians with a copy of the petition no later than 15 days prior to the hearing.
	Aff.Sub.Wit.		
✓	Verified		The following issues from the last hearing remain:
	Inventory		
	PTC		1. Need Notice of Hearing.
	Not.Cred.		
	Notice of Hrg	X	2. Need proof of service of 15 days' notice prior to hearing of the Notice of Hearing along with a copy of the Petition for Visitation pursuant to the Order on Ex Parte Petition for Visitation and Probate Code § 1460 for the following:
	Aff.Mail	X	
	Aff.Pub.		<ul style="list-style-type: none"> Michael W. Purkey, Co-Guardian, Julie E. Cable Skaggs, Co-Guardian.
	Sp.Ntc.		
	Pers.Serv.		Reviewed by: LEG
	Conf. Screen		
	Letters		Reviewed on: 9/2/15
	Duties/Supp		
	Objections		Updates:
	Video Receipt		
	CI Report		Recommendation:
	9202		
	Order	X	File 12 – Milton
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		

Status Hearing Re: Filing of the First Account or Petition for Final Distribution

DOD: 2/24/14		RACHELLE IRELAND , Daughter, was appointed Executor with Full IAEA without bond on 4/16/15. Letters issued 4/17/15. At the hearing on 4/16/15, the Court set this status hearing re filing the first account or petition for final distribution. Final I&A filed 5/16/14 indicates a total estate value of \$199,122.60. Supplemental I&A filed 7/29/14 indicates an additional asset valued at \$43,919.00. Various receipts have been filed in connection with distribution of misc. personal effects. Various creditor's claims have also been filed. Status Report filed 6/10/15 states there are two properties: a rental property that has been listed for sale since October 2014, and a one-half interest in a residence that the decedent owned with her partner, Gary Pritchard, both in poor condition. The house was also listed for sale in October 2014. Executor tried for several months to lower the sale price or do a short sale, but Gary would not agree or sign or provide any required documents. It has been very difficult dealing with Gary and for six months he would not pay any money towards the mortgage, even though he is on the loan and living there. He has finally decided to move forward with a short sale, and the house is currently vacant. The attorney recently received a call from Lou Rodriguez from Community Housing of Fresno, who informed her that Gary is trying to do a short sale, but he needed the estate's approval. Mr. Rodriguez stated that Gary did not tell him that the estate owned one-half of the property until the bank required the estate's approval. There is a buyer, and the estate is waiting to hear back whether the bank will accept the offer. The short sale could take three to six months to complete, but there is a possible \$5,000 cash back short sale incentive for the estate to complete short sale rather than letting it foreclose. Ms. Horton requests a 90 day continuance.	NEEDS/PROBLEMS/COMMENTS: <u>Minute Order 6/12/15:</u> Counsel requests a continuance. The Court informs counsel that she should be checking at least weekly to aid in ensuring that Gary Pritchard does not again attempt to sell the estate real property without the personal representative's knowledge. <u>Minute Order 7/15/15:</u> Counsel requests 60 days. Note: On 7/24/15, a Notice of Proposed Action was filed indicating short sale of the residence for \$126,000.00 on or after 8/8/15. 1. Need First Account or Petition for Final Distribution.
Cont. from 061215, 071515			
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			

Page 2

Status Hearing Report filed 7/13/15 states on 6/16/15, she spoke on the phone at length with Realtor Russell Smith about the listing of the North Fork rental property. The sale price was recently reduced from \$105,000 to \$98,000, and there is an \$81,000 mortgage on the property. Mr. Smith stated that the wooden post holding the sale sign has been stolen several time, and that the neighborhood is not good. The house cannot qualify for an FHA loan so they are not reaching a majority of qualified buyers. Most homes sell in the summertime due to people looking for vacation homes, but there has been a decrease in tourism and activity the past couple of years. There were several evacuations due to forest fires and fire insurance rates have risen significantly. There are a couple of other listings in the area that have been on the market for over three years in better condition.

The Decedent's Fresno residence was also in poor condition, and was listed for sale, but the actual value is less than the outstanding mortgage of over \$156,000. Ms. Horton left a message for Lou Rodriguez from Community Housing of Fresno, who called back 6/17/15 and informed her that they have not heard back from the bank whether the \$126,000 cash offer was accepted.

On 7/7/15, Mr. Rodriguez had still not heard back from the bank. On 7/13/15, Ms. Horton called Mr. Rodriguez for an update. He stated that the bank required one of the forms to be corrected. He submitted the corrected form on 7/8/15 and is now waiting for an answer back from the bank.

Once they know what the buyer will accept and the terms of sale, a Notice of Proposed Action will be sent out. Per Mr. Rodriguez, the short sale process will take anywhere from 10-30 days to complete. There is a possible \$5,000 cash back short sale incentive for the estate to complete short sale rather than letting it foreclose.

Per the recorder's website, no deeds have been recorded since 2006.

The estate cannot close until both properties are sold, so Attorney Horton requests continuance for 60 days for further status.

Attorney Janisse, Ryan M. (for Dianne E. Coolidge, Administrator)

Probate Status Hearing Re: Filing of the First Account and/or Final Distribution

DOD: 2/18/2014	DIANNE E. COOLIDGE , spouse, was appointed Administrator with Limited IAEA with bond of \$27,000.00 .	NEEDS/PROBLEMS/COMMENTS:
Cont. from	Letters issued on 10/14/2014.	Note: <i>Petition for Instructions Regarding Farm Lease Agreement and Proceeds of Crop</i> was filed by Dianne E. Coolidge on 8/5/2015 and is set for hearing on 9/21/2015 .
Aff.Sub.Wit.	Pursuant to Probate Code § 8800(b) , <i>Corrected Final Inventory and Appraisal</i> was due filed 1/13/2015 showing an estate value of \$50,000.00 .	Note: Amended Order Appointing Administrator was filed 9/22/2014, with <i>Letters</i> issuing on 10/14/2014 after filing of proof of bond. Therefore, the status hearing set by Court on 7/9/2014 is premature for the filing of the first and/or final account, as the account is not due until 10/14/2015 . Court may wish to set a status hearing for the filing of the first and/or final account at the time the <i>Petition for Instructions</i> is heard on 9/21/2015.
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg	Pursuant to Probate Code § 12200 , first account and/or petition for final distribution is due 10/14/2015 .	
Aff.Mail		
Aff.Pub.		
Sp.Ntc.	Minute Order dated 7/9/2014 from the hearing on the petition for letters of administration set this status hearing on 9/9/2015 for filing of the first account and/or petition for final distribution.	
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: LEG
Status Rpt		Reviewed on: 9/2/15
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 14 - Coolidge

Attorney Mele, James J. (for Diana Medina, Administrator)

Probate Status Hearing Re: Filing of the First Account and/or Final Distribution

DOD: 11/6/2013		NEEDS/PROBLEMS/COMMENTS: OFF CALENDAR Order for Settlement of First and Final Account filed 6/11/2015.
Cont. from		
	Aff.Sub.Wit.	
	Verified	
	Inventory	
	PTC	
	Not.Cred.	
	Notice of Hrg	
	Aff.Mail	
	Aff.Pub.	
	Sp.Ntc.	
	Pers.Serv.	
	Conf. Screen	
	Letters	
	Duties/Supp	
	Objections	
	Video Receipt	
	CI Report	
	9202	
	Order	
	Aff. Posting	
	Status Rpt	
	UCCJEA	
	Citation	
	FTB Notice	
		Reviewed by: LEG Reviewed on: 9/3/15 Updates: Recommendation: File 15 – Medina

Attorney Del Castillo, Thomasito (for Bret Helgren, Executor)

Probate Status Hearing Re: Filing of the First Account and/or Final Distribution

DOD: 12/19/2013		NEEDS/PROBLEMS/COMMENTS: <p style="text-align: center;">OFF CALENDAR</p> <p>Judgment of Final Distribution on First and Final Account filed 6/3/2015.</p>
Cont. from		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: LEG
		Reviewed on: 9/3/15
		Updates:
		Recommendation:
		File 16 – Chadwick

Order to Show Cause

DOD: 1/18/14	<p>SANDRA BROWN was appointed Executor with Full IAEA without bond on 3/19/15. Letters issued on 3/25/15.</p> <p>At the hearing on 3/19/15, the Court set a status hearing for 8/12/15 for the filing of the Inventory and Appraisal.</p> <p>Minute Order 8/12/15 states: Sandra Brown represents to the Court that she has made numerous attempts to phone Mr. Farmer and has gone to his office, but has been unable to make contact. The Court issues an Order to Show Cause to C. Michael Farmer as to why he should not be sanctioned for his failure to appear today. Mr. Farmer is ordered to be personally present in court on 9/9/15. The Court admonishes Ms. Brown to not make any payments or distributions without the Court's order.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need Inventory and Appraisal pursuant to Probate Code §8900 or written status report pursuant to Local Rule 7.5.</p>
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		

DOD: 06/22/07		LARRY DONALDSON , former Trustee, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. Declaration of Larry A. Donaldson in Support of Trustee's Report and Account for Petition for Settlement was filed in the estate matter (Page 2D on this Calendar) on 08/31/15. However, the Declaration refers to and amends this Trust Accounting. Therefore it appears the Declaration should have been filed in this case. Because the matter has not been filed in the correct case, Examiner is unable to consider it with regard to this trust accounting.
		Account period: 06/22/07 – 04/13/15	
		Accounting: \$1,663,714.00	
		Beginning POH: \$1,315,830.00	
		Ending POH: \$303,625.64	
Cont. from		(See Note 1, this information has been amended by Declaration filed in wrong case)	
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail	w/	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		

Petitioner states, at the time of his death, decedent's assets were not titled in the name of the Trust and a probate proceeding was commenced. After being appointed personal representative of the estate, Petitioner believed, incorrectly, that he had authority to transfer assets from the probate estate to the Trust without court authorization and Petitioner took steps to transfer the probate assets to the Trust.

At the time of his death, decedent had an ownership interest in a condo in Thailand. Before his death, Decedent told his step-daughter, Laura Pattillo, and Petitioner, that he had made a Thai Will naming Laura Pattillo and Timothy Leonard (step-son) as beneficiaries of that will so that they could inherit the condo under the laws of Thailand. Unfortunately, no such will could be located after decedent's death.

Under Thai laws, only a blood relative can inherit an interest in real property without a will describing otherwise. Decedent had an estranged daughter, Christina Wallace, but she was only to receive \$10,000.00 as an inheritance.

Continued on Page 2

Reviewed by: JF
Reviewed on: 09/04/15
Updates:
Recommendation:
File 18 - Wallace

Petitioner made a trip to Thailand to try to locate the will, check on the condition of the condo, and to hire a Thai attorney to assist with the transfer of the condo to the Trust so that it could then be transferred to the decedent's step-children as he desired. Unfortunately the Thai will could not be located. The attorney hired indicated that the only way to transfer the condo to the Trust would be for the decedent's daughter to take possession of the condo and transfer it to the Trust. An agreement was made with Christina Wallace to travel to Thailand to appear in court to accomplish the transfer. Instead of transferring the property to the Trust, however, the property was put up for sale. A buyer was located after 1 year, but due to the length of time since the sale was authorized by the court, the Thai Land Authority would not allow the sale to go through without Christina Wallace again travelling to Thailand and obtaining court authority. Christina refused to cooperate again and therefore the sale did not go through. The decedent still owns the condo in Thailand.

Petitioner states that he incorrectly paid himself for his duties as personal representative of the estate before he realized that payment required court approval.

Petitioner performed duties as trustee and made distributions as outlined in the Trust.

Petitioner prays for an Order settling the account for the period from 06/22/07 to 04/15/15

19 Nathan Finney, Breanna Finney & Rikki Finney (GUARD/P)**Case No. 15CEPR00122****Former Guardian Stone, Tennison (Finney) Anita (Pro Per)****Current Guardian Alvarez, Chantelle (Pro Per – Aunt)****Order to Show Cause**

Nathan, age 16	TENNISON ANITA STONE , step-mother, was appointed guardianship of the person of each of the three minors on 07/01/2015.	NEEDS/PROBLEMS/COMMENTS:
Breanna, age 14		
Rikki, age 10		
Cont. from		
Aff.Sub.Wit.	Per Minute Order of 08/27/2015 the Court ordered that the Orders/Letters appointing Tennison Finney, are suspended forthwith and appoints Chantelle Alvarez as Temporary Guardian of the minors.	
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg	Minute Order of 08/12/2015 set this Order to Show Cause. Minute Order states the Court issues an Order to Show Cause to Tennison Stone as to why she should not be sanctioned for her failure to appear today and her failure to provide proof of counseling for the minor. Ms. Stone is ordered to be personally present in court on 09/09/2015. Clerk's Certificate of Mailing shows the minute order dated 08/12/2015 was mailed to Tennison Stone on 08/12/2015.	
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: LV
Status Rpt		Reviewed on: 09/04/2015
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 19 – Finney

Status RE: Filing of an amended petition

DOD: 4/8/14		<p>EDWARD ANTHONY GUTHERY filed a Petition to Determine Succession on 6/26/15.</p> <p>Examiner Notes for the hearing on 8/12/15 noted:</p> <p>Need amended petition with all information and attachments as required by Probate Code §13150.</p> <p><u>Note:</u> It appears the decedent was survived by a spouse and issue, who would all be heirs pursuant to Probate Code §6400 et seq. In order to use this summary procedure, all successors in interest must petition together.</p> <p>At the hearing on 8/12/15, the Court set this status hearing for the filing of an amended petition.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need amended petition or written status report pursuant to Local Rule 7.5.</p>	
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			x
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input type="checkbox"/>	Notice of Hrg			x
<input type="checkbox"/>	Aff.Mail			x
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input type="checkbox"/>	Letters			
<input type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
			<p>Reviewed by: skc</p> <p>Reviewed on: 9/3/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 19 – Guthery</p>	

Petition for Appointment of Guardian of the Person (Prob. Code §1510)

			See petition for details.	NEEDS/PROBLEMS/COMMENTS:
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail	W		
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report	X		
	Clearances	X		
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 9/3/15	
			Updates:	
			Recommendation:	
			File 21 – Boudreau	

22 Vera Lowe (Estate)**Case No. 15CEPR00735**

Attorney Jaech, Jeffrey A. (for Eugene Y. Lowe – Petitioner)

Petition for Probate of Will and for Letters of Administration with Will Annexed.

Authorization to Administer under the Independent Administration of Estate Act

DOD: 03/13/2015		EUGENE Y. LOWE , requests appointment as Administrator with Will annexed without bond. Named executor and alternate executor nominate petitioner as Administrator with Will Annexed Full IAEA – o.k. Will dated: 10/07/2002 Codicil: 04/02/2012 Residence: Fresno Publication: The Business Journal	NEEDS/PROBLEMS/COMMENTS: 1. Need date of death of the deceased spouse pursuant to Local Rule 7.1.1D. <u>Note: If the petition is granted status hearings will be set as follows:</u> • Wednesday, 02/10/2016 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal <u>and</u> • Wednesday, 11/09/2016 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution. Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.	
Cont. from				
<input type="checkbox"/>	Aff.Sub.Wit.			s/p
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			w/
<input checked="" type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.		Estimated value of the Estate: Personal property - \$110,000.00 Real property - \$500,000.00 Less encumbrances - \$65,000.00 Total - \$545,000.00 Probate Referee: Rick Smith	
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input checked="" type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting		Reviewed by: LV Reviewed on: 09/03/2015 Updates: Recommendation: File 22 - Lowe	
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			

Petition for Probate of Will and for Letters Testamentary; Authorization to Administer
under the Independent Administration of Estates Act

DOD: 6/24/15		DEAN W. ALLEN , Named Executor without bond, is Petitioner. Full IAEA – ok Will dated 8/14/13 Residence: Fresno Publication: Business Journal Estimated value of estate: Personal property: \$660,000.00 Annual income: \$13,200.00 Total: \$673,200.00 Probate Referee: Steven Diebert	NEEDS/PROBLEMS/COMMENTS: <u>Note:</u> The Court will set status hearings as follows: <ul style="list-style-type: none"> Wednesday, February 10, 2016 for filing the Inventory and Appraisal Wednesday, November 16, 2016 for filing the first account or petition for final distribution If the proper items are on file pursuant to Local Rule 7.5, the status hearings may come off calendar.	
<input type="checkbox"/>	Aff.Sub.Wit.			
✓	Verified			
✓	Inventory			
✓	PTC			
✓	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			W
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
Reviewed by: skc Reviewed on: 9/3/15 Updates: Recommendation: SUBMITTED File 23 – Wilson				

Pro Per Petitioner De Los Santos, Anthony Lupe (Pro Per Petitioner)

Petition for Appointment of Temporary Guardian of the Person

		<u>General Hearing set for 11/2/2015</u>	NEEDS/PROBLEMS/COMMENTS:
		ANTHONY DE LOS SANTOS , maternal grandfather, is Petitioner.	1. Need <i>Notice of Hearing</i> and proof of five (5) court days' notice by personal service of the <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Temporary Guardian</i> , or <i>Consent to Appointment of Guardian and Waiver of Notice</i> , for:
		~Please see Petition for details~	
Cont. from			• Ulissa De Los Santos , mother, if Court does not find due diligence; Declaration states the Petitioner submitted the address of where the mother and child are staying to the Fresno Police Dept.
	Aff.Sub.Wit.		
✓	Verified		• Father.
	Inventory		
	PTC		2. Need Attachment 3 explaining the affirmative answer to Item 3 of Petitioner's <i>Confidential Guardian Screening</i> form filed on 8/31/2015.
	Not.Cred.		
	Notice of Hrg	X	
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.	X	
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: LEG
			Reviewed on: 9/3/15
			Updates:
			Recommendation:
			File 24 – De Los Santos